

Using Office Management Software to Run Your Business Efficiently, Confidently and Profitably

by Wendy Woodburn, Manager, Membership Services

RUNNING YOUR BUSINESS EFFICIENTLY, CONFIDENTLY AND PROFITABLY DEPENDS ON YOUR ABILITY TO KEEP YOUR FINANCES IN ORDER. Tools ranging from a ledger to office management software allow large and small businesses to do so. One such software provider, eTrac, an Appraisal Institute affinity provider, has added a suite of new features to its flagship product and increased its current commitment to Appraisal Institute members.

The eTrac Office Manager software allows multi-appraiser offices to receive, assign, track, deliver and process payments for all appraisal orders in the system from one simple program.

The basics

Included in the Office Manager is a calendar function that appraisal offices can use to stay in sync with each other. This calendar feature provides online appointment, meeting and time-off scheduling. Also, all appraisal inspections and due dates are automatically copied to the calendar. Further, the eTrac Calendar is downloadable to Microsoft Outlook for use on mobile devices.

The software also includes over 50 standard reports for monitoring production and tracking finances.

Add-ons

Appraisal Institute members will now receive \$100 off of the market price of \$399 for the basic eTrac

Office Manager tracking system. In addition, there are a variety of discounts on the add-on products.

Report Builder – Report Builder is for appraisers who would like to create custom management reports, be it for turn-around times, outstanding receivables or assignment status. As an added bonus, all reports developed can be instantly exported to Microsoft Excel for further analysis. Appraisal Institute members are eligible to receive 20 percent off the \$240 per year rate, bringing their cost to \$192 for this add-on.

QuickBooks – eTrac is now integrated with QuickBooks financial management software, which will eliminate the need to double enter financial information between the two programs. All pertinent accounting information from eTrac can be directly transferred into QuickBooks using the eSync program (see Figure 2). Normally priced at \$100, this add-on

will also be discounted 20 percent for Appraisal Institute members. In addition, eTrac will waive the \$99 set-up fee.

Credit card payments – Appraisers who accept credit card payments or checks sent online can sign up for this functionality via eTrac, which also allows these types of payments via a cell phone or wireless device. In addition to offering all of its clients a low rate of 2.15 percent when using this feature, eTrac will also waive the \$50 set-up fee for Appraisal Institute members.

Marketing Center – The newest feature to the eTrac systems family is the electronic Marketing Center. The add-on allows the user to send plain text or HTML-formatted e-mails to the user's entire client base or a select group just by picking that group from their existing database of clients, appraisers and

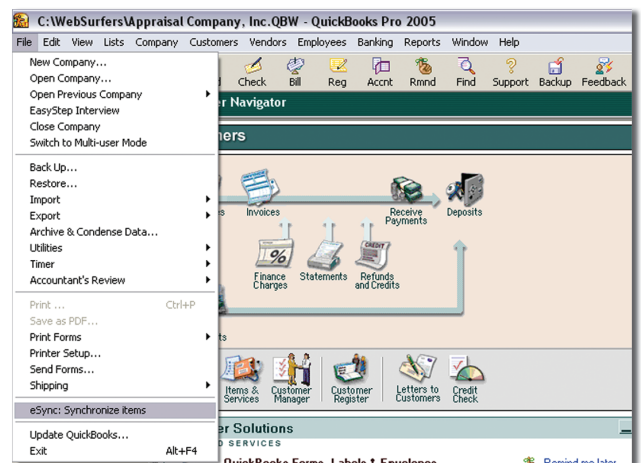


Figure 2. The office management software features eSync technology allowing the user to load QuickBooks information.

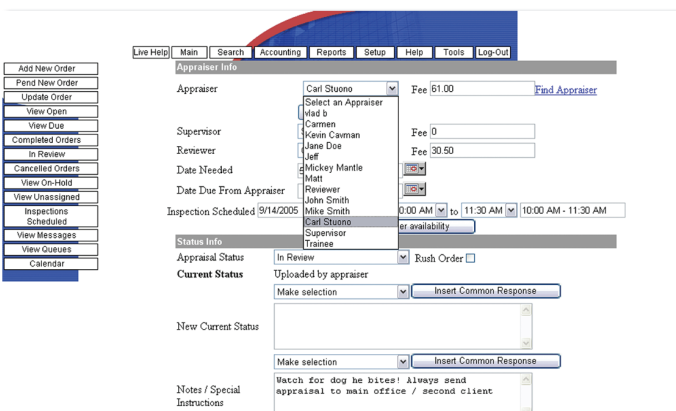


Figure 1. The assignment page of the new eTrac Office Manager software

staff. The program is wizard-based, wherein a step-by-step tutorial walks the user through each step of the creating and sending process, and can be used anywhere the user has Internet access. Through this marketing center, a variety of e-mail communications can keep you in touch with your clients, such as: newsletters, special offers, follow-up e-mails, appraiser notices, customer service announcements, invitations, office closings, past due notices, birthday e-mails and holiday greetings.

The add-on, normally priced at \$240, is also being offered to Appraisal Institute members at a 20 percent discount.

Web Studio – Further marketing help is available via eTrac’s Web Studio package (see Figure 3), which includes a domain name, Web hosting, individual e-mail accounts and Web site visitor statistics. This system also uses a wizard-based program (a walk-through tutorial) to ensure a user at any

- files and Microsoft Word documents;
- Ability to automatically integrate eTrac Office Manager;
- Free domain name registration, annual renewal and Web hosting; and
- Built-in order form allowing the user to download orders to their favorite appraisal forms software.

The Appraisal Institute member discounted price is \$239, which is 20 percent off of the list price of \$299.

Savings add up

To build an eTrac package using the features listed in this article, Appraisal Institute members will save over \$400 off nonmember retail price. Additionally, eTrac can be used to build a customized package to fit any appraiser’s needs and budget.

“As eTrac has grown, so has its commitment to value, service, quality and Appraisal Institute members,” according to eTrac president Vladimir Bien-Aime.

Appraisal Institute member Jeremy McCarty, SRA, the CEO of Electronic Appraisal Solutions, Inc., in Roseville, Calif., said, “As a CEO and veteran appraiser with over 20 years experience, I can honestly say I have seen a lot of software companies come and go. However after two years with eTrac, I know this company will be around for the long haul. eTrac’s tools provide my company a significant advantage over our competition by increasing our efficiency and productivity. Further, with all of the savings this new

discount program the Appraisal Institute provides, there’s really no question with whom we will be working in the future.”

To learn more about eTrac’s discount programs, the Appraisal Institute or to inquire about program training sessions, contact eTrac directly at 877-My eTrac or visit its Web site at www.myetrac.com.

For more information on Appraisal Institute membership, please contact Wendy Woodburn, Manager, Membership Services, at 312-335-4191. ■

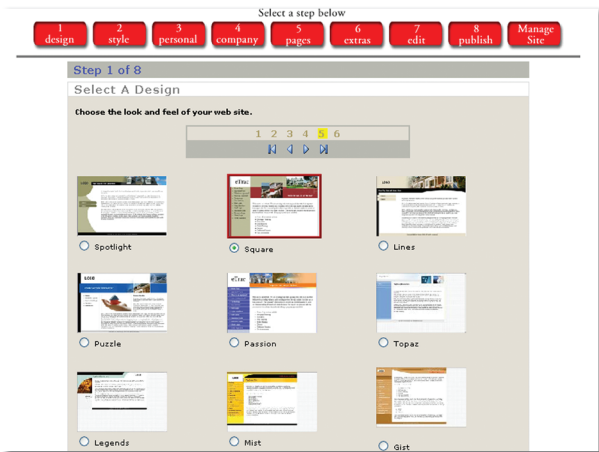


Figure 3. The eTrac Web Studio package provides all of the basics for a Web presence, essential in today’s marketplace.

technological level will be able to build an informative and functional Web site.

A sample of the Web-building features, allowing one to build a professional appraisal Web site quickly, include:

- Over 50 unique designs with pre-written, fully customizable appraisal Web pages;
- HTML editing feature for advanced users;
- Built-in spell check;
- Web site statistics providing key visitor data to enhance your marketing efforts;
- Ability to upload images, Adobe PDF